EXTRA WORK BILLING (EWB) APPLICATION

PHASE I

STEP-BY-STEP INSTRUCTIONS

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INTRODUCTION

The Extra Work Billing Application System is an automated computer system which allows contractors performing work for Caltrans Construction Program to submit Contract Change Order (CCO) Billing electronically. The Extra Work Billing (EWB) System will be implemented in a phased approach. Each phase will add to the capabilities of the previous phase; so that upon the completion of all phases, the process of handling extra work bills will be more timely, efficient, and effective.
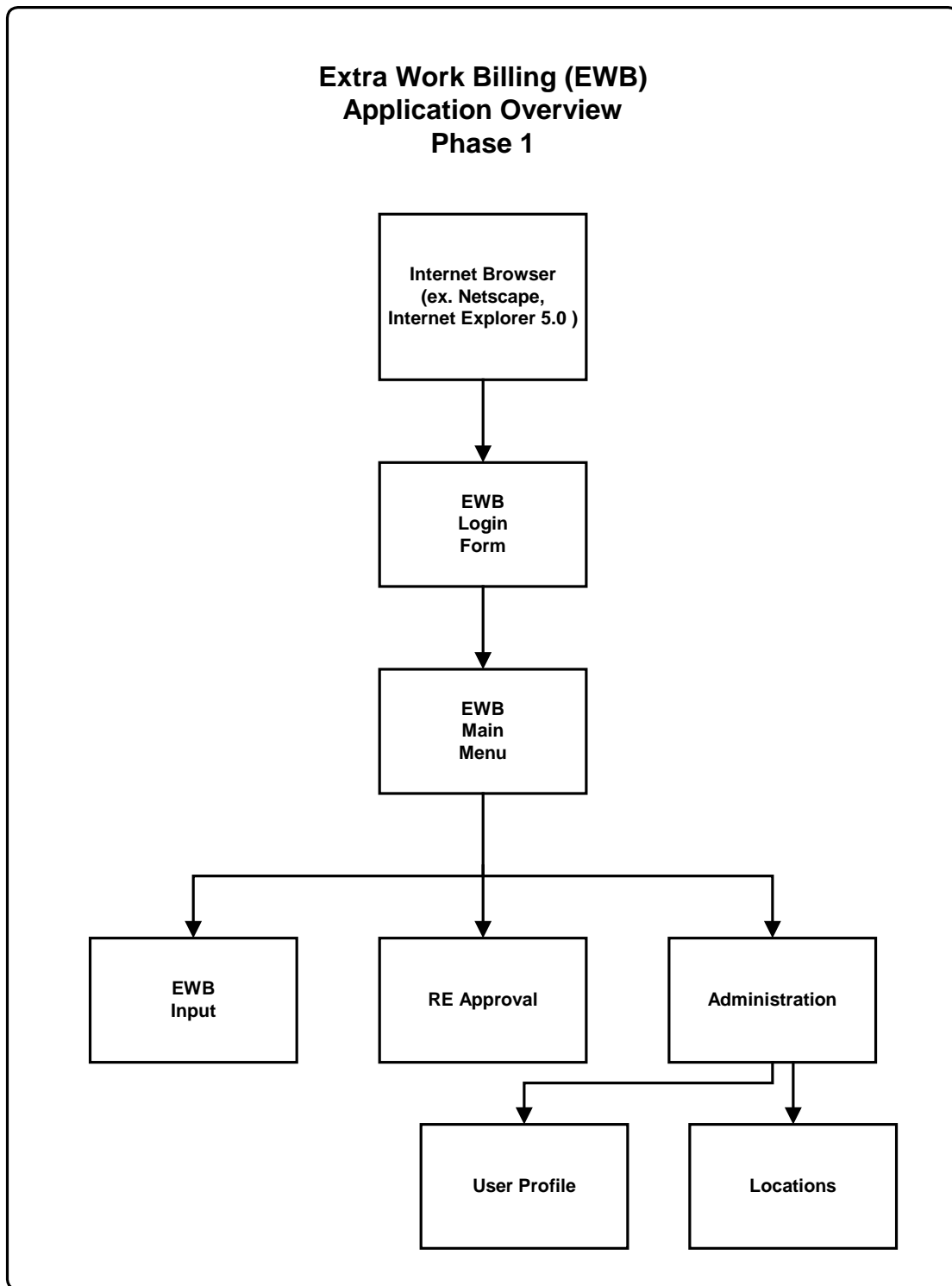
Phase I will improve the EWB submission process and reduce the amount of key-entry required to input EWBs into Contract Administration System (CAS). This will be done by providing the EWB Application System where contractors are able to key-enter EWBs directly into a centralized database by means of a web-based application. The core of the EWB Application System is a centralized database to store all EWB data as well as other Construction Program-related information.

This document provides information regarding the use of Phase I of the Extra Work Billing System. The document is organized with step-by-step instructions for each task to be accomplished using the EWB system.

The EWB System may be accessed through the Internet using either Netscape Navigator or Internet Explorer. Specific instructions for system access appear later in the System Access portion of this document.

The diagram on the following page shows the elements of the system and the flow of access and actions. This diagram shows the EWB Main Menu as being presented after Logon to the EWB system. This screen will appear to internal Caltrans staff using the system. Contractors using the system will be placed immediately in the EWB Input segment of the application once they Logon to the system.

Extra Work Billing Application Overview – Phase I

**Extra Work Billing (EWB)
Application Overview
Phase 1**

```
                 ┌──────────────────┐
                 │ Internet Browser │
                 │  (ex. Netscape,  │
                 │Internet Explorer │
                 │      5.0 )       │
                 └──────────────────┘
                          │
                          ▼
                 ┌──────────────────┐
                 │       EWB        │
                 │      Login       │
                 │      Form        │
                 └──────────────────┘
                          │
                          ▼
                 ┌──────────────────┐
                 │       EWB        │
                 │      Main        │
                 │      Menu        │
                 └──────────────────┘
```

EWB Input	RE Approval	Administration

User Profile	Locations

NAVIGATION THROUGH THE EWB APPLICATION

There are three buttons in the top right-hand corner of the screen. These are standard buttons in Windows applications. For the EWB system, some additional benefits are provided by use of the <u>maximize</u> button. Once you have logged onto the EWB application and are presented with either an EWB Input screen, an RE Approval screen, or an Administration screen, click on the maximize screen button in the top right-hand corner of the screen. The maximize button is the center button of the three described below:

1) The left-most minimize button removes the screen display and places a reference to it at the bottom of the screen on the status bar line. To return to a minimized screen, at any time, click on this reference.

2) The maximize button enlarges the screen display, causing the current window to fill the screen, and places a line of information directly above the status line at the bottom of the screen. This line provides assistance related to what type of input the system expects for a particular area of the screen where the cursor is placed. Whenever you logout and login, it is advisable to maximize the screen by clicking this button, so that this information is available to you.

3) The right-most X button logs the user out of the current screen. When you click on the X button, you will be prompted to respond if you want to save your changes. Click on yes or no depending on your desired actions. <u>You must click one or the other to proceed.</u>

At the very bottom of the screen is the <u>Status Bar</u>. Whenever you want to move to another EWB screen or the main menu, look at the Status Bar. You will often see that you can move directly to the desired screen by clicking on an open, but minimized, screen name that appears on the Status Bar. The complete name for the screen referenced on the Status Bar will be displayed when you point to the truncated name. If you are in EWB Input or EWB Approval, the EWB Main Menu will also be an option to which you may move.

When you are finished with all tasks and want to be completely out of the EWB system, be sure that all open windows are closed, including your browser window. Check the status bar to see if any windows in the EWB system or your browser remain open. If any EWB windows appear on the Status Bar, click the reference, so the screen is displayed. Then Click X to close the screen. Also, if you have no tasks to do which require the browser, close that window by maximizing the screen and clicking X.

The **Tab** key is used to move from one field on the screen to the next moving left to right and top to bottom. Holding the **Shift key and depressing the Tab key** will move the cursor backward through the screen. At the end of a line of data entry, such as on the Materials or Labor charges screen, strike the **down arrow key** to move to the left-hand

side of the **next entry line**. One can also use the mouse to navigate by clicking in any field on the screen.

If a field is required, the cursor will not move out of the field until data is entered. Once the data is verified and correct, the cursor will be released and can move to another field. All errors on each screen (EWB, Equipment, Material, etc.) must be corrected before the record will be saved to the database.

A **beep** indicates a message is displayed. The message may be instructional or advisory. In some cases, the user may have to respond to the message.

The EWB Input Screen

Extra Work Billing Phase1 - EWB Input – EWB Tab

COMMAND MENU

The Extra Work Billing (EWB) System Phase 1 contains one drop down Command Menu displayed across the top of the screen and an iconic button toolbar. The command menu and toolbar work like any other Microsoft pull down menu and toolbar. If the user clicks

on a choice on the command menu, a drop down list of options will appear. To execute an option, click on it. If the user points to an icon, a prompt will appear to inform the user of the action initiated by clicking on the icon.

Across the top of the screen are the five main action choices: File, Edit, Record, Window, and Help. The subordinate options under each of these choices are as follows:

- **FILE:** this menu contains the following choices
  - ➢ **Clear All** – clears all data from the current screen
  - ➢ **Save –** saves all changes that were made to any of the screens
  - ➢ **Reports –** allows the user to choose from variety of pre-designed reports and send the report to a report reader such as Adobe Acrobat Reader (see Reports section)
  - ➢ **Change Password** – provides a popup window to allow the user to change his password (see Change Password section)
  - ➢ **Exit** – exits the current screen in the EWB application
- **EDIT:** contains the following choices
  - ➢ **Cut –** works the same as Microsoft Word; removes an area of text which is highlighted
  - ➢ **Copy –** works the same as Microsoft Word; copies an area of text which has been highlighted; saves in a buffer for pasting to another area of a document or to another document
  - ➢ **Paste –** works the same as Microsoft Word; place the cursor where one desires to paste a previously-copied or previously-cut area of text, click on the Paste key. The copied or cut area will appear at the point where the cursor was located prior to the pasting action.
- **RECORD:** contains the following choices
  - ➢ **Previous –** navigates to the previous record on a multi-record screen such as the Equipment screen
  - ➢ **Next –** navigates to the next record on a multi-record screen such as the Equipment screen
  - ➢ **Scroll Up –** scrolls the current tab's list of records so that previously-hidden records from the bottom of the list are displayed
  - ➢ **Scroll Down –** scrolls the current tab's list of records so that previously-hidden records from the top of the list are displayed
  - ➢ **Insert –** creates a new record in the current folder tab after the current record
  - ➢ **Remove –** removes the current record from the block and marks it for deletion from the database when the Save is performed
  - ➢ **Clear –** removes the current record from the block and does not mark it for deletion if it has previously been saved to the database
- **WINDOW:** works the same as Microsoft Word; allows one to switch to a different window on the desktop
- **HELP:**
  - ➢ **Display Error –** provides additional information if an error is encountered

The Toolbar

The Toolbar has as many as eleven iconic buttons: Save, Reports, Copy, Previous Tab, Next Tab, New Record, Remove Record, Submit, and Re-Submit .

If you point to any of the icons across the top of the screen, a prompt displays explaining the name of the icon. The functions are as follows:

- Save – saves all changes that were made to any of the screens;
- Reports – allows the user to select from a variety of pre-designed reports and sends the report to a report reader such as Adobe Acrobat Reader;
- Copy – makes a copy of the current EWB displayed on the screen. A new Contractor Report Number is then generated for this new EWB record. The copy button is not available in the RE-EWB Approval screen;
- Previous Tab – navigates the user to the next tab to the left of the current tab selected;
- Next Tab – navigates the user to the next record displayed on the screen;
- New Record – clears the screen for new input;
- Remove Record – deletes the current record selected. If in the EWB tab, all of the EWB records will be deleted;
- Submit – found only on the EWB Input screen. This option changes the status of the EWB to Submitted and will be displayed in the EWB Approval screen as New for action by Caltrans;
- Re-Submit – found only on the EWB Input screen. Clicking on this button makes a copy of the currently-displayed EWB and designates a revision number automatically. The user may then make revisions and submit the newly-revised EWB using the submit button.
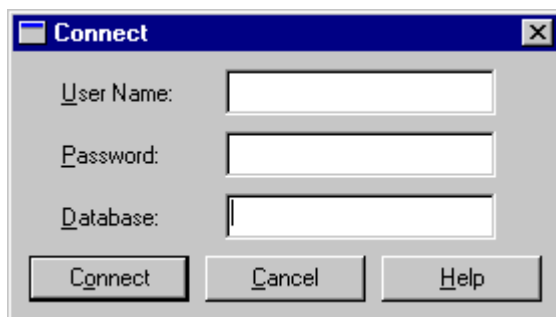
LOGON AND LOGOFF THE EWB APPLICATION SYSTEM

Logon Screen

The Extra Work Billing (EWB) System Phase 1 Logon Screen is the main link which connects the user to the EWB database and application. Upon a successful logon, Caltrans staff, when connecting to the URL[1] (uniform resource locator) http://svhqas004.dot.ca.gov:8083 will be presented with the EWB main menu. *(See Screen Shot Page 11)* Contractors, when connecting to the URL (uniform resource locator) http://svhqas004.dot.ca.gov:8082) will be presented with the EWB Entry Screen ready to add EWBs or perform other EWB-related tasks. *(See Screen Shot Page 12).*

A Username and Password will be assigned to each individual user of this application. The name of the Database will remain constant and be available to all users. Once the three fields are keyed, the user will then have access to the application and EWB data.

The following Connect screen is the logon screen for all users. Place the cursor in the User Name field using the mouse and clicking. Enter your user name, tab to the Password field and enter your password, tab to the Database field and enter **ewbtrain**. Then use the Mouse to click the connect button.

Extra Work Billing System Phase1 – Logon Screen.

LOGOFF THE EWB SYSTEM

Before you leave the EWB system, be sure to save any work that you have entered. Then, to leave the EWB system, click out of all screens that you have open. Ensure that you are out of each screen by checking the Status Bar at the bottom of the screen to be sure no windows remain open. Also, logout of your Internet browser by maximizing the

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[1] A uniform resource locator (URL) is an address for an Internet web site. The format is *http://* followed by the Internet address.

browser screen and clicking on the X in the upper right-hand corner. Use you usual method to disconnect from your Internet Service Provider (ISP).

To Change a Password:

When it is necessary to change your password, follow these tasks:
- Choose File from the Command Menu
- Click on Change Password
- The below screen will appear
- Type in a new Password in the 'Enter New Password' box;
- Re-type the new Password in the 'Verify New Password' Box;
- Click the 'OK' button if you do not encounter any errors. Click the 'Cancel' button if you do not wish to continue with this process. You will return to the first tab on the form.

Change Password

Change Password

Enter New Password

Verify New Password

Cancel   OK

Extra Work Billing Phase1 – Change Password

LOG ON SCREEN FOR CALTRANS STAFF
FOR EWB INPUT, RE ACTIONS, & ADMINISTRATION TASKS
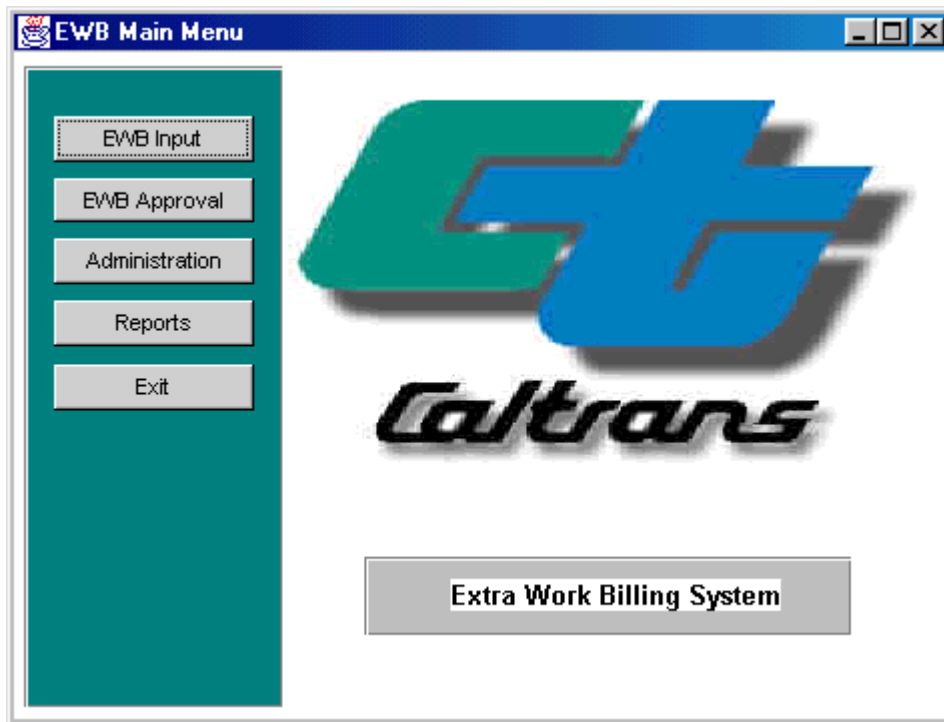
EWB INPUT SCREEN

Extra Work Billing Phase I – EWB Input Screen

General Information:

- This form is used to process a user query for a detailed extra work billing record, to enter a new extra work billing record, or to change and delete extra work billing records
- Initially, when entering the form, the user will be in "INPUT" mode. The cursor will be in the first field of the "Contract Number", which is the District number.
- Saving the extra work billing record to the database can be accomplished either by depressing the save icon button or by clicking another "folder tab" (Equipment, Material, Labor, or Other) of the EWB Entry form. When either of these two requests are made, you will be prompted to save the record. If any errors occur, a message will be displayed via an alert, a "bell" will sound, and the cursor will be placed on the error field.

How To Input A New EWB

- **To enter new EWBs: Click on the** New Record button which clears the screen for new input

The green New Record icon is used to put the form in an "INPUT" mode. Clicking this icon will clear the form. **You must be in this mode to enter a new EWB.** The cursor will be placed in the District field of the second block on the screen awaiting data entry. If you have entered an EWB, but have not saved it and do not wish to save it, and depress this icon, the form will be cleared and the record just keyed in **will not be saved**. If there are any changes pending on the form, you will be prompted to save them after depressing this button.

Required fields on the EWB screen are:
- Contract Number
- CCO number
- Contractor Rpt. No.
- Various Dates or Date Performed
- Labor Regular Surcharge
- Payment method
- Description of Work
- Performed by

Either the Various Dates checkbox must be checked or the Date Performed must contain a valid date (but not both) for the Contract Number to be added to the database. If you fail to enter data in one of these fields, you will receive an error message saying "Date Performed must be blank if Various Dates is checked".

In all cases while using the EWB Input screen, labor surcharge information will be required to proceed. Put a number in that box of the entry screen, and you will then be allowed to proceed with your actions.

EWB Input – Equipment Folder Tab

EWB Input – The Equipment Folder Tab is provided for the entry of the contractor equipment costs used to perform work on a Contract Change Order (CCO). Up to 20 equipment records may be entered for one EWB.

Extra Work Billing Phase1 - EWB Input – Equipment Folder Tab

When you click on the Equipment Folder Tab, the contract information (Contract #, CCO#, Contractor Report #) will appear along the top of the page. Your cursor will be automatically placed in the first line under Equipment ID Number. The line will be numbered automatically. To exit a field, you must use the Tab key.

Required fields on this folder tab are
- Equipment ID
- Equipment Class
- Equipment Make
- Equipment Model
- Regular Hours OR Overtime Hours

To move to the next line to enter data, strike the down arrow key. If you have entered all necessary information and are at the end of your last completed line, click the Save icon before moving to another folder tab or screen.

EWB Input – The Material Folder Tab

EWB Input – The Material Folder Tab is provided for entry of the contractor material and/or work done by specialist or Lump Sum or Unit Price Payments. It is not practical to use the Extra Work Billing to compute invoices, due to tax and discount; the net amount of the invoice should be entered as a unit. Up to 10 material records may be entered for an EWB. Contract information will be carried here from the EWB tab.

Extra Work Billing Phase1 – EWB Input – The Material Folder Tab

- Move through the form entering the required information and using the Tab key
- Required fields on this folder tab are:
  - Units and Unit Cost
  - Net Pay
  - Invoice Date is required with Invoice No. or both may be null
- Use the down arrow key to move to the next line once you have completed a line of data entry.
- At the end of the last line to be entered, click the Save icon. Respond to the query to Save or not as desired.

EWB Input – The Labor Folder Tab

 EWB Input – The Labor Folder Tab is provided for entry of the contractor labor costs used to perform work on a Contract Change Order (CCO). This screen includes fields that are used to record or calculate labor surcharges. Contract information will be brought forward from the EWB screen. The cursor will be placed in the first line in the Craft ID field.

Extra Work Billing Phase1 – EWB Input – The Labor Folder Tab

- Enter data and tab to the next field. If the maximum characters are entered, the cursor will automatically move to the next field.
- Required fields on this folder tab are:
  - ➢ Craft ID
  - ➢ Labor Name First
  - ➢ Labor Name Last
  - ➢ Data must be entered in at least one of the following sets:
    - ➢ Labor Reg Hours & Labor Reg Rate
    - ➢ Overtime Hours & Overtime Rate
    - ➢ Subsistence Units & Subsistence Rate
- At the end of the last line of data entry, click the Save icon.
- Respond to the query to Save or not as desired.

EWB Input – The Other Folder Tab

EWB Input – The Other Folder Tab is provided for entry of the Other Expenses subject to labor markup from the Labor Input form. Contract information will be brought forward from the EWB screen. The cursor will be placed in the description field.

Extra Work Billing Phase1 – EWB Input – Other Folder Tab

- Enter necessary data and tab to the next field. If the maximum characters are entered, the cursor will automatically move to the next field.
- Enter the Description, the only required field on this folder tab
- Amount or Travel Expenses (Units & Rate) must be entered, but not both.
- After all necessary data entry, click the Save icon.
- Respond to the query to Save or not as desired.

How to Save an EWB

Once you have entered all information on any folder tab, click the save icon to save that information.   Be sure that you have seen a message that the information is saved, before clicking on, and proceeding to, another folder tab.

How to Find An Existing EWB

Warning: If you click on the **Find** button in the first block of the entry form, you will be presented with a List of Values (LOV) which will show existing EWBs in the database. If the boxes next to the Find button are all clear and you are a contractor, you will be presented with all EWBs on contracts to which you are assigned. If you are a Caltrans employee, you will be presented with a list of all EWBs for the default district displayed. The District defaults to the first contract assigned to the user. You will likely want to narrow your search as described below.

To narrow your search:

- Enter the District Number in the first blank box next to the Find button, and then click on the Find button. You will be presented with all the EWBs for that district.

- If you enter the District Number and the EA Number, you will be presented with a list of all EWBs for that district and contract number. So your search will be limited to EWBs related to that district and contract number only. This will shorten the list of EWBs with which you will be presented and will make your search more efficient.

- There are two ways to select the EWB with which you wish to work. 1) When you see the EWB you want to revise displayed on the List of Values, double click this EWB. The system will enter all information into the Entry Screen fields.   2) Highlight the EWB with which you wish to work, click on the OK button on the LOV screen. The system will enter all information into the Entry Screen fields.
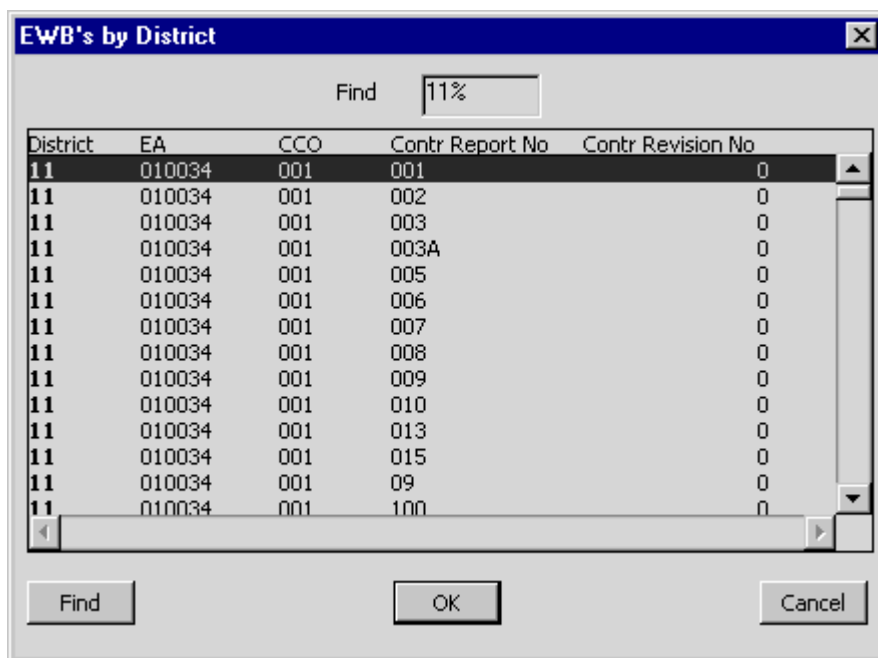
To call up an existing EWB, enter EWB Input from the Caltrans Main Screen. **If you are a contractor**, you will be placed in the EWB input screen directly from the logon screen. You will not see the Caltrans Main Screen.

Once you are on the EWB Input screen, you have a choice of <u>two types of actions</u>:
Entering new EWBs or Updating (or reviewing) existing EWBs. **It is very important
that you be in the right "mode" for the actions you wish to perform.**

- **To enter new EWBs: Click on the** ➕ New Record button which clears the screen
  for new input
- **To be in update mode (for updating or reviewing),** click the Clear button. The
  Clear button appears in Block 1 of the screen. The first field will contain the default
  district number which is based on a user's contract assignments. If you wish to see an
  EWB for a different district, click on the default to highlight it.   While it is
  highlighted, enter the number of the District for the EWB you wish to see displayed.
  Depress the Tab key to move to each subsequent blank field to enter the EA #
  (labeled Contract Number), CCO #, and Contract Report #.   Then click the Find
  button.

A List of Values (LOV) screen will appear that lists EWBs based on the parameters
defined. Click twice on the one you wish to see or highlight the one you wish to see and
click the OK button on the bottom of the LOV box. You will be returned to the EWB
Input screen, and all existing information for the selected EWB will be filled in on the
screen.

Extra Work Billing Phase I - List of Values (LOV) Screen

How to Update An EWB Which Was Created, But Was Not Submitted

- Use the FIND function (described above) to retrieve the EWB.
- All data previously entered will be available for update.
- Use the Tab key or the Mouse to navigate to the item to be modified.
- Make the revisions you need to make.
- Depress the SAVE icon. **Be sure to click the Save icon at each folder tab before proceeding to another folder tab.** Navigating to another folder tab (Equipment, Material, Labor, or Other) using the Mouse will display an instructional message to save any pending changes.
- Click the SUBMIT icon button.
- The "Status of EWB" field will display a message that the EWB is submitted in ORACLE.

When a valid EWB has been displayed, the user can then modify the data or click on another folder tab to perform maintenance functions or view any existing data.

How to Delete An EWB

An EWB may be deleted if it has been entered, but not submitted. Once an EWB has been submitted, it may not be deleted. However, once an EWB has been submitted, it may be resubmitted. Do this by calling it up, using the Resubmit button to make a copy labeled with a revision number (automatically), revising or adding data and using the Submit button to send the revision to the Oracle system.

How to Re-Submit An EWB Which Was Previously Submitted and Rejected

- Use the FIND function (described above) to retrieve the EWB.
- Depress the Re-Submit icon button. (Looks like an Undo button in Windows.) A copy of the original EWB is made and the revision number is incremented by 1.
- Review any RE notes or comments
- Make any necessary revisions or additions.
- When all revisions or additions are complete, click on the "Submit" button to send the record to the EWB (Oracle) system
- The "Status of EWB" field will display a message that the EWB has been submitted in ORACLE, and the Revision number will be incremented by one (1).

How to Preview and Print An EWB

- Use the FIND function (described above) to locate the desired EWB
- Click on the printer icon to view the EWB or use Reports from the File menu
- To print the EWB from the Reports menu:
  - ➢ Verify the information in the Reports screen and Click Preview
  - ➢ The system will call up Adobe Acrobat displayed by Netscape Navigator
  - ➢ Choose Print in Adobe Acrobat
  - ➢ The Windows Print Menu will appear
    - Enter any further information such as the number of copies desired
    - Check the printer destination to be sure the print your want is designated
    - Click Print
  - ➢ Click out of Adobe Acrobat by clicking the X in the right-hand corner of the window
  - ➢ Click out of the top window of Navigator (Navigator is called to bring up Adobe Acrobat, so you will have **two** Navigator screens open)
  - ➢ Other features on the Reports Menu:
    - Find – works the same as on the EWB Input screen
    - Clear – clears all the data from the date range, user name, and find fields on the reports menu only.
    - Close, brings you back to the screen where you called it from

How To Check Status On A Previously-Submitted EWB

- Use the FIND function (described above) to retrieve the EWB.
- Once the EWB is displayed, read the Status Box on the right-hand side of the screen
- Or call up the reports menu and preview the EWB status report by date, and or contract no., etc.

How to View a Previously-Submitted EWB

- Use the FIND function (described above) to retrieve the EWB.
- You may review any information on the EWB

How to Modify or Add to A Previously-Submitted EWB

- A user may add to or modify a previously-submitted EWB **ONLY** if it has not been approved by an RE.

- Use the FIND function (described above) to retrieve the EWB.

- Click on the Re-submit button to make a duplicate copy of the EWB. This EWB copy will be labeled with a revision number automatically (initially Revision 1).
- Make any changes or additions to the revised EWB that are necessary.
- Once all revisions are complete, save the EWB
- Click on the Submit icon to relay the revised EWB to the Oracle system for review by a Caltrans Resident Engineer.
- Check the status block to see that the status of the EWB has changed to Submitted.

REPORTS

The Extra Work Billing (EWB) System Phase 1 will allow the user to choose from pre-designed reports and view them in a report reader. Clicking on the Reports option of the drop down File menu, or clicking the Printer icon in the toolbar, will present the user with the Reports window.   From the EWB Reports window, the user has the ability to input or choose data items about the type of report to view. If one enters EWB Approval and requests reports, the contract number defaults to the first EWB appearing on the Approval Screen. The user can use the clear button on this number and replace it with the desired contract number to get a report for a different EWB.

Extra Work Billing Phase1 – Reports

How to Request a Report

To get the Report Menu:
- Click on the print icon on the toolbar
- A window labeled Reports will appear

- To define the time frame for the report:
- Enter the Date Range which the report is to cover using format MM/DD/YYYY

To limit the report to those EWBs associated with your User ID:

- If you are a Contractor, your User ID will automatically appear in the User Name block. For Caltrans employees, completing this field is optional.
- If you are a Caltrans employee and you blank out this block, all EWBs with the selection criteria specified will be displayed.

To limit the report to a particular Contract Number, CCO Number, Contr Report No, and Revision No:

- Enter Contract Number and CCO Number
- If one enters EWB RE Approval and requests reports, the contract number defaults to the first EWB appearing on the Approval Screen. The user can use the clear button on this number and replace it with the desired contract number to get a report for a different EWB.

Extra Work Billing Phase1 – Reports

To define the category of EWB to reflect on the report:
- If the report is for EWBs originated in Oracle, be sure the Oracle box is checked
- If the report is for EWBs originated in CAS, be sure the CAS box is check
- Both Oracle and CAS may be checked if the report is to cover EWBs originating in both systems

To define the status on the report:
- Define the status of the EWBs you wish to see reported by ensuring that a check is in the box beside that status. The status requested may be Approved, Rejected, or Pending or it may be any combination of the three statuses.

How to View A Report

To view a report:
- Complete the steps required to request a report (see the previous page)
- Click on the Preview Button
- The report will be displayed on the screen in Adobe Acrobat

How to Print A Report

To print a report once you have called it up to view as described above:
- Once the report is displayed in Adobe Acrobat, click print on the Adobe Acrobat screen
- The Windows Print screen will appear
- Enter any further information such as the number of copies desired
- Check the printer destination to be sure the print your want is designated
- Click Print
- Click out of Adobe Acrobat by clicking the X in the right-hand corner of the window
- Click out of the top window of Navigator (Navigator is called to bring up Adobe Acrobat, so you will have **two** Navigator screens open)

RESIDENT ENGINEER ACTIONS

The EWB Approval screen is provided for Approval or Rejection of EWB's submitted by Construction Contractors. The form is divided up into one folder tab and four buttons that provide the user with EWB data sorted differently. From this screen, REs (or their designates) may choose to approve, reject, or designate as pending any EWB displayed. The user may also choose to look at details regarding an EWB or print an EWB.

Once the user has completed any required tasks in the EWB Approval Screen, click on the Save icon to save the completed tasks, then click the X in the upper right-hand screen corner to leave the screen. One will be presented with the EWB Main Menu from which one can select EWB Input or Administration.

The EWB Approval screen displays buttons (referred to as radio buttons) on the left side of the screen. The buttons are defined as follows:

- New – Indicates that the EWB has been submitted by the Contractor, but not yet reviewed by the Caltrans.
- Pending – Indicates that the EWB is pending approval by Caltrans. The EWB may have been reviewed, but there are open questions or information is missing.
- Rejected – Indicates that the EWB was rejected by Caltrans. In this case, the EWB remains in Oracle with a rejection note. A contractor may revise and update the EWB there or on his own system and submit it again. The EWB will be labeled with a revision number automatically to distinguish it from the original. The original EWB is never revised, once it has been rejected. There may be several revisions to an EWB, each with a unique revision number.
- Approved – Indicates that the EWB was approved by Caltrans.

- The RE Approval Screen has one folder tab: All EWBs. There are four buttons, near the top portion of the screen, which function as follows:

- Use of the Contract Button – clicking on this button will display the pending EWBs for a specific RE sorted by Contract Number, Submit Date, CCO, and RE Report Number.
- Use of the By Date Button – clicking on this button will display the pending EWBs for a specific RE sorted by Submit Date, Contract Number, CCO, and RE Report Number
- Use of the By Contractor Button – clicking on this button will display the pending EWBs for a specific RE sorted for a specific Contractor
- Use of the By Status Button – clicking on this button will display the pending EWBs sorted by status, such as new, pending, rejected

Extra Work Billing Phase1 – The EWB Approval Screen

If an RE, or RE designate, wants to look at an EWB which is pending or new (other than one assigned to him or her), he or she must look at it by going to the EWB Entry Screen and executing a query (Find) action. First, check the status bar at the bottom of the screen to see if the EWB screen is open. If so, click on this icon to move to that screen.

How to Select an EWB and Review Its Details

- Place the cursor on the line which provides information about the EWB you wish to review
- Click on the Detail button at the right end of the screen to see more information
- The EWB input screen will appear with details about the selected EWB
- Click the other folder tabs such as Equipment, Material, Labor, and Other to see information for those elements for the selected EWB
- To return to the RE screen, close the input form after viewing an EWB from the EWB approval screen.

- Once your tasks have been completed, you may approve, reject, or designate the EWB as pending by clicking the appropriate button on the same line as the EWB being handled and add comments to the comments area on the same line.
- To add comments, place your cursor in the comments field by clicking there with the mouse, and enter your remarks. This field has a large capacity of 500 characters.

How to Approve the EWB

- Click on the Approve button to the left of the screen on the line where the contract information for that EWB is displayed.
- An RE Report Number is <u>required</u> to complete an approval
- Save your work before leaving the screen by clicking on the Save button
- Choose an icon at the bottom of the screen to move to another EWB System screen or click the X at the top of the screen to exit the EWB Approval section
- Remember to click out of any open EWB screens whose names are displayed in the Status Bar and out of the browser as well if you are finished with all EWB tasks

How to Reject and Add Comments to the EWB

- Click on the Reject button to the left of the screen on the line where the contract information for that EWB is displayed.
- Comments are <u>required</u> on rejected EWBs. Place your cursor in the comments field by using the mouse and entering your remarks
- Save your work before leaving the screen by clicking on the Save button
- Choose an icon at the bottom of the screen to move to another EWB System screen or click the X at the top of the screen to exit the RE Approval section
- Remember to click out of any open screens whose names are displayed in the Status Bar and out of the browser as well if you are finished with all EWB tasks

How to Preview a Detailed Report of the Entire EWB and Send to Adobe Acrobat for Printing

- Click on the printer icon, to the right of the screen, on the line where the contract information for the EWB you wish to print is displayed.
- Your screen display will change: a screen will appear which indicates some actions are taking place. This is to bring up Adobe Acrobat reader, which will display the requested information.
- Click on printer

- You will get the typical Windows Print Menu page which is displayed on your computer whenever your request to print using the file menu in a Windows application

- Click the OK button on the Windows Print Menu

- The document will emerge from your printer (if you have the printer turned on and there is paper in it)

- Save your work before leaving the screen by clicking on the Save button

- Click out of Adobe Acrobat by clicking the X in the right-hand corner of the window

- Click out of the top window of Navigator (Navigator is called to bring up Adobe Acrobat, so you will have **two** Navigator screens open)

- Choose an icon at the bottom of the screen to move to another EWB System screen or click the X at the top of the screen to exit the RE Approval section

- Remember to click out of any open screens whose names are displayed in the Status Bar and out of the browser as well if you are finished with all EWB tasks